

Potential Economic Impacts Of Tourism Development

**Trousdale County,
Tennessee**

1996



Economic Development

Executive Summary

This analysis provides information needed to estimate certain impacts in the Trousdale County economy that would typically result from any tourism project that might be undertaken. It provides factors that allow these economic impacts to be estimated once the project's expected employment is determined. In particular it permits estimates of total increases in employment, sales, wages and salaries, and other earnings that can be expected throughout the county's economy as a result of a successful new tourist facility or attraction.

The analysis uses the recent experience of other small counties in the Tennessee Valley seven states as a basis to determine the business sectors that have significantly greater levels of activity than does Trousdale. It does so by selecting small counties with large tourism components in their economies and comparing them in an appropriate manner with the same activities in Trousdale.

The factors that result from this analysis can be simply expressed as numbers of employees or dollars per employee relative to the expected number of jobs in the new tourism project. **For every new job in a typical tourism project in Trousdale County, the following are economic impacts that can typically be expected in the county:**

- **2.2 additional jobs in the county in other business sectors;**
- **\$241,000 in new sales revenues generated in the county by the project and all secondarily impacted businesses;**
- **\$89,000 new earnings for all affected local proprietors and employees.**

The major commercial businesses affected are eating places, hotels and motels, grocery stores, and gasoline service stations.

Using the study results, total employment, sales, and earnings impacts for the county can be estimated for any project by applying the factors to the expected employment for the project. Changes in the earnings of county residents could be easily calculated if a reasonable estimate of the fraction of the new workers that can be expected to be resident in the county is available.

One significant feature that the approach followed in this analysis makes evident is that small county economies vary significantly in their relationship to tourism activity. This may be partly due to the nature of each county and the particular tourism activity in each county. It does suggest additionally, however, that achievement of typical or greater impact results may hinge on additional development efforts in the secondary business sectors affected by the new tourism activity in the county.

This study does not attempt to estimate public costs and benefits. It does, however, provide some essential information required for that purpose. Using the estimates of total employment impact, a factor could be applied to derive number of new residents; then family size and school age children factors could be used, along with per capita municipal and education costs to estimate public costs. Similarly, sales tax revenues from local sales may be easily calculated using the sales estimates and a tax rate to get at least one portion of expected public revenues. Other factors may require additional information.

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Impact Analysis

Overview Of Traditional Methods And Concepts

Economic impact analysis can be defined in various ways. In most cases, it is some science and a lot art. A full economic impact study could be considered to embody a benefit-cost analysis. Such a study would seek to address how much a development project is worth on net to an area; that is, it would seek estimate by how much total benefits will exceed total costs.

Economic Benefit Estimation

Estimating benefits for impact analysis has traditionally been approached using a variety of concepts and techniques. Some of the most prominent are:

- basic versus nonbasic industry
- input-output analysis
- area economic multipliers
- economic benefit leakage

Economic Base Theory

Economic base theory is a widely accepted theoretical approach for understanding how a local economy works. The theory assumes there are two principal components to a local economy: basic and nonbasic. The basic sector sells goods and services outside the area, importing dollars, and resulting in net increases in local income. The nonbasic sector services the local economy by recirculating dollars in the local economy, and, therefore, provide no net addition of income to the local economy.

The concept is fairly easy to understand, but may be hard to directly apply. It may be difficult to determine the basic and nonbasic components for a particular project, for example. Since the approach is also closely related to the input-output and multiplier approaches, it also suffers some of the same problems; these problems will be discussed in those subsections.

The basic idea that new projects that bring in outside dollars will impact and create new economic activity is, however, a valid concept. Expectation of additional economic impact (which perhaps can be measured in the multiplier sense) is a reasonable expectation.

Input-Output Analysis

This theoretical concept provides a framework to comprehensively evaluate interactions between industries within an economy. It is based on the notion that for a dollar of output in each industry, it requires some part of a dollar of input from other industries.

As part of the input-output process, it is possible to calculate how the impact of one dollar (or one job) ripples through an economy. The economic multiplier provides a measure of the economic ripple effect that an initial expenditure creates. It measures the effect that the employment, earnings, or output from a given employer will have on other types of businesses. If those other industries exist in a study area, those effects may be felt in the area.

Input-output models face several difficulties:

- the data used in constructing I-O models is usually quite old.
- the model is static, but the economy is highly dynamic.
- the model assumes a fixed mix of industries and industry relationships.
- Multipliers are sensitive to geographic boundaries, and less than multicounty input-output results are unavailable or expensive.

For these reasons, comprehensive I-O tables, though they have been and are used, can not readily be relied on to supply useful information for analysis of many small area projects. Less extensive sets of U.S. and non-specific interindustry multipliers, such as those published by the *U.S. Chamber of Commerce*, can sometimes be used, although it is usually anyone's guess as to how applicable they are for a given small area.

Area-Industry Multipliers

Economic impacts on an area, as measured by the multiplier effect, can be viewed as having three primary components:

- direct effects—the change directly introduced into the local economy by outside capital.
- indirect effects—the jobs and production needed to produce the goods and services required from within the region to support the influx of new capital. This, of course, will vary by industry.
- induced effects—the jobs and production required to fulfill the household demands for goods and services generated by the earnings of all the additional demand from the two elements above.

In addition, there are three major types of regional multipliers:

- output (or value-add or income or sales) multipliers—this multiplier is of greatest interest to regional economists

who are interested in measuring the growth of a local or regional economy. It may be of less interest to public officials and developers, since most people have trouble directly relating the concept of increases in general economic output to their daily well-being.

- employment multipliers—this is defined as the total employment supported in the local economy divided by the amount of employment generated by the new enterprise. This is the most widely used and cited economic multiplier. It is easily understood and the most relevant, in many cases, in a local policy context.
- earnings or wage multipliers—this is the total money to be paid by all direct, indirect, and induced employment divided by the money earned at the project enterprise. This multiplier is widely used and understood.

One aspect of area-industry multipliers that makes them difficult to determine, is that multipliers are usually larger the greater the geographic area and the greater the economic diversity in the area. Several other difficulties that plague the estimation of specific area multipliers are:

- The data, as with I-O models, is usually quite old.
- The models do not account for wage, cost, and migration dynamics over time.
- They cannot readily be adjusted for the differences in local area economic structures.
- Important differences may exist in the nature of projects even though they are in a similar industry; these too cannot be readily accounted for.
- The project may be in a hard-to-define industry; for example, tourism industries vary widely and no generally accepted definition exists.

The multiplier concept, while undoubtedly valid and useful, is often

difficult to apply. In many, if not most, cases a great many simplifying assumptions must be made and highly uncertain parameter values must be applied. Experience indicates that quite often project multipliers in the range of 1.5 to 3.0 seem reasonable for many areas, although it is not uncommon to find significantly higher values reported.

Economic Benefit Leakage

A key issue in measuring economic impacts is the issue of dollars leaking out of the local economy. At each stage of circulation some new dollars generated by a project will flow out of an area. To maximize the ongoing economic benefits, communities want to minimize the amount of leakage that occurs. Communities which lack the kinds of stores and industries desired by local businesses and residents will experience high levels of leakage. Conversely, counties which have this kind of desirable supplier and retail base will stand a better chance of retaining new income generated in a local economy.

Therefore, counties, in order to develop, must look for ways to bolster their local economies in terms of providing more opportunities for dollars to be spent locally. These strategies include expanding retail opportunities, encouraging growth in business services, and encouraging local businesses to patronize local service providers. Improvements in community infrastructures are sometimes needed to remove barriers to these goals.

Economic Cost Estimation

Several techniques have emerged for evaluating the public costs associated with economic development projects. Perhaps the most common approach is the use of per capita multipliers. This approach is used in impact analysis to assess the public costs associated with employees. It is based on estimates of the number of residents and

school children likely to result from a particular housing configuration. This is applied to an estimate of new resident population resulting from the project.

The next step is to multiply by per capita expenditures for municipal services and per pupil expenditures to derive a cost to associate with the project. The method is relatively easy to apply, but does require some possibly difficult assessments of the important parameters, particularly the total new local employment and the percentage of that new employment that will be locally resident.

Two other approaches are common:

- case study approach—based on a detailed examination of local conditions to estimate the true costs of accommodating new growth. It often uses detailed surveys and interviews, and may, therefore, be quite expensive.
- comparable city method—similar to the case study method, but involves interviewing administrators associated with similar projects in other communities (also hopefully comparable).

Computer Models

Computer models have been developed and used to estimate both benefits and costs from development projects. Computer model approaches typically attempt to develop a database of as much relevant data as is feasible. This data may include data on the costs and revenues of the project in both its construction and operational phases, as well as data relating to public costs and public revenues that would have

relationship to the project. Various multipliers would typically be inputs to the model.

Thus these models typically rely on inputs from some of the methods discussed above. Using these inputs they can automate many of the complex and dynamic calculations that might be cumbersome to

attempt without the benefit of the pre-organized structure of the model.

However, because these models rely on inputs from various techniques which are based on numerous data estimates and assumptions, its results can be no stronger than the validity of the inputs upon which it feeds.

Analysis For Trousdale Tourism Projects

Introduction

This analysis has a somewhat narrow goal: to derive factors to allow reasonable estimates of the ultimate potential increases sales, employment, and earnings occurring in Trousdale as a result of any increase in tourism activity in the county. The analysis provides these estimates for the four digit SIC business classifications with the highest positive impacts.

This study does not provide any estimates of public or private benefits or costs that might be associated with any tourism development. Therefore, this is not a benefit cost analysis and cannot be used, at least directly, to economically evaluate the desirability of any particular tourism project.

It is left to local development personnel to estimate public costs and benefits. We suggest using the per capita method for public costs (discussed in the previous section) to make estimates, once a level of new employment and earnings is ascertained using the results of this analysis. This would involve estimating the percent of new employment that will be resident and applying estimates of the average family size, the average number of school age children, and the associated municipal and education costs.

This study does not attempt to address any costs or possible impacts associated with any construction phases of tourism facilities or attractions. The focus here is on the potential for growth that exists for other types of local businesses as local tourism

activity (as measured by employment) increases.

The approach used in this analysis is not one of the traditional methods discussed in the previous section. Instead, it is an empirical analysis based on comparisons of actual county experiences across the seven Tennessee Valley states. It is in theory related to the multiplier and input-output concepts in that factors are derived that relate changes in related businesses to a given change in a selected business.

Methodology

The attraction of visitors to new tourist facilities in Trousdale County can be expected to ultimately create a potential for new economic activity in the tourism enterprise as well as in other businesses in the local area.

The method developed to estimate this potential is based on the notion that if we evaluate the employment levels of a number of small counties that have relatively large numbers employees in a group of tourism related business classifications, we should be able to detect and measure the differences in those counties across a broad spectrum of commercial four-digit SICs from the levels existing in Trousdale County.

After adjusting for population differences and placing on a per tourism business employee basis, these differences can be averaged to identify and quantify the difference between Trousdale and these counties.

The steps performed for this analysis are basically as follows:

- Select a group of four digit SICs that are highly tourist oriented (see below).
- select a group of small counties (<28,000 population) in the seven Tennessee Valley states that have significant levels of tourism activity as measured by employment (see chart on following page for list of selected counties and their population and commuting characteristics).
- Compare these counties for all four digit SICs with Trousdale, using only SICs that appear in at least one-half of the benchmark counties.
- Calculate a population-adjusted employment difference (the “potential”) for all the SICs between the group average and Trousdale
- Calculate a per 100 employment potential for Trousdale
- Rank the potential employment in descending order and cut off at 5 employees per 100 tourism employees.
- Estimate impacts on sales, employment, and earnings (by place of work) per a given number of new tourism employees.

The business classifications selected as representing tourism enterprises are:

7032–Sporting And Recreational
Camps

7033–Trailer Parks And Campsites

7996–Amusement Parks

7999–Amusement And Recreation,
nec

8412–Museums and Art Galleries

8422–Botanical And Zoological
Gardens

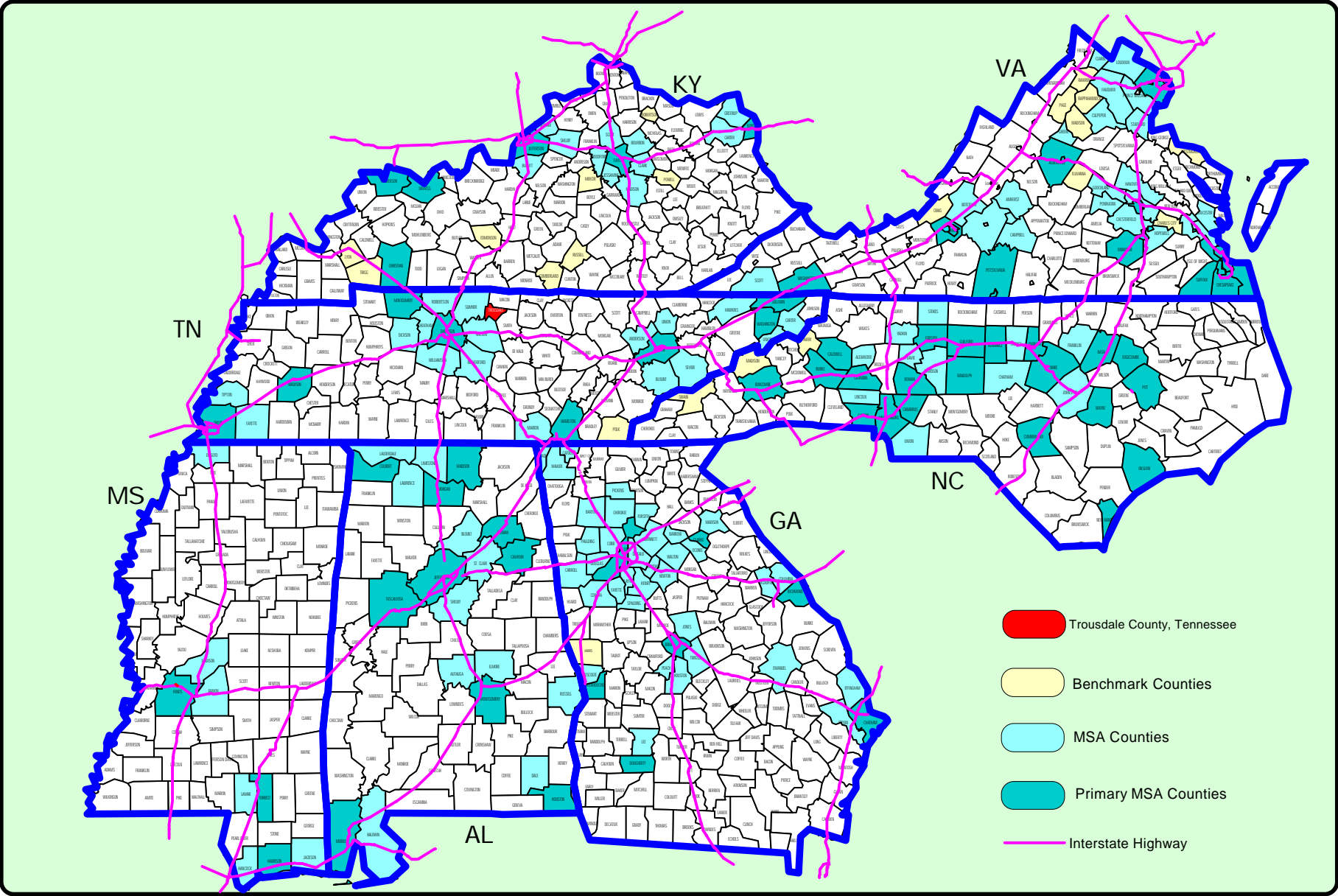
The methodology used here has several potential advantages:

- It requires a minimal set of assumptions that have little empirical basis; it is primarily an empirical calculation from factual data.
- It allows estimation of impacts at a fairly detailed level: four digit SIC business classifications.
- It does not suffer from problems of wide variations in the sizes of local economies, since the benchmark counties are, like Trousdale, quite small.
- The resulting earnings and employment potentials can be averaged and applied to arrive at impact totals, but variances about the average can be easily observed. This is important as it highlights the probable fact that secondary development may not automatically follow a tourist development. It may require additional development efforts focusing on these secondary developments.
- A very uncertain number in many tourism impact studies is the total offsite expenditures in a local area by visitors. Even more uncertain is the components of these expenditures by types of businesses. This method avoids the need for these numbers, since it simply isolates the differential in impacted businesses for typical tourism activities.

All Selected Counties--Population And Commuting

<u>County</u>	<u>1990 Population</u>	<u>Total In- Commuting</u>	<u>Total Out- Commuting</u>	<u>Net In- Commuting</u>
HARRIS, GA	18,991	1,235	5,554	-4,319
CUMBERLAND, KY	6,780	303	497	-194
EDMONSON, KY	10,354	203	2,094	-1,891
LYON, KY	7,415	994	929	65
MERCER, KY	19,641	1,692	3,506	-1,814
POWELL, KY	12,042	499	1,849	-1,350
ROBERTSON, KY	2,173	44	454	-410
RUSSELL, KY	15,579	2,079	845	1,234
TRIOG, KY	10,916	527	1,434	-907
AVERY, NC	15,018	1,710	1,773	-63
MADISON, NC	17,357	864	3,715	-2,851
SWAIN, NC	11,687	1,604	775	829
POLK, TN	13,937	1,071	3,520	-2,449
TROUSDALE, TN	6,114	692	1,204	-512
CHARLES CITY, VA	6,580	389	2,486	-2,097
CRAIG, VA	4,593	125	1,479	-1,354
FLUVANNA, VA	14,604	1,003	4,345	-3,342
MADISON, VA	12,210	725	3,003	-2,278
PAGE, VA.	22,376	707	3,551	-2,844
RAPPAHANNOCK, VA	6,932	1,294	2,029	-735
WARREN, VA	28,225	1,942	6,790	-4,848
WESTMORELAND, VA	16,074	846	3,727	-2,881

Trousdale County, Tennessee And Benchmark Tourism Impact Counties



Findings

Employment Impact Potentials By Type Of Impacted Business

The analysis of the group of Trousdale benchmark tourism counties resulted in the identification of twelve SICs with significant potential for job gain. These twelve are the four digit SICs that had an average of at least 5 employees per 100 new tourism employees. Eleven of these are included in our final result—one was eliminated because it seemed too unusual and perhaps too removed from normal market forces. The anomalous case is elementary and secondary education, and it had the highest impact of all twelve businesses. This will be discussed further below.

Of interest also is the fact that only three four digit SICs showed a negative average employment differential, and the largest value was only minus 15 employees per 100 tourism employees. Therefore, it seems quite reasonable to assert, that on the whole, the major economic impacts can be expected to be positive. Only these positive impacts are reported in this study.

The eleven types of impacted businesses that demonstrate positive impacts from tourism are shown in the charts at the end of this report. Each chart shows bar graphs for the employment in the four digit SIC for all the benchmark counties per employee in the defined tourism industry. These charts allow examination of the variance of activity in the business over the set of counties. Also, the values in the charts are used to derive an average potential employment. This has been calculated by population adjusting the relative employment values and averaging them. The

resulting values are also shown on each chart.

The business type with the highest calculated potential is SIC 5812—eating places. Actually, this SIC is both SIC 5812 and SIC 5813 combined. This was done in the original data in order to eliminate some reporting inconsistencies in the raw data.

Eighteen of the twenty-one benchmark counties had relatively higher levels of employment in this business than did Trousdale, based on this 1995 data. This results in an average potential employment for Trousdale of 63 employees per 100 tourism employees.

The second highest potential employment impact is for SIC 7011—hotels and motels. Nineteen of the benchmark counties had higher relative values than Trousdale. The calculated potential is 39 additional employees.

These first two results seem reasonable. Others that are readily explainable as widely occurring impacts are: 5411—grocery stores (potential employment: 19); 5541—gasoline service stations (potential employment: 8); SIC 4311—postal services (potential employment: 8); and, perhaps, SIC 8011—doctor's offices and clinics (potential employment: 6).

Several others seem more likely to be less generic and more dependent on the particular nature of tourism facilities. These might include 2421—sawmills and planing mills (potential employment: 15); SIC 4911—electric services (potential

employment: 15); and SIC 1711–plumbing, heating, and air conditioning (potential employment: 10). There may also be a relationship between these and what appears to be an impact resulting from increased residential construction.

Why residential construction appears as an impacted industry is not, perhaps, easily explained. Certainly there is likely to be an initial phase of additional construction as impacts wind their way through the local economy. Possibly this is what is being reflected here, as not all of these secondary impacts may have yet taken place in a significant group of these counties. Also, it may be the case that continuing tourism expansion is generally occurring, spreading impacts over longer periods of time.

Perhaps the most unusual result is the large and widespread impact on primary and secondary education. It is not hard to see how schools could easily benefit from new tourism dollars. However, the extent to which that happens is going to depend, it would seem, on local government decisions and actions much more than on free market decisions.

Because we believe this to be the case, we have separated out this education impact from the rest of the analysis (the chart for education is shown on the last page of the charts). This is not to say that this potential impact is unimportant; it may be very important. Also, it is potentially very useful to see the extent to which some other communities are using these external dollars to invest in its residents' futures. But we believe this impact will largely be determined by local government policies, and therefore, no typical case can be made.

Final Results For Potential Trousdale Tourism Impacts

The employment impacts by type of business can be used to derive estimates of total impacts for a given number of new tourism jobs in terms of sales, employment, wages and salaries, and other earnings. This is done in the charts on the next two pages.

The first chart estimates sales. It uses estimates of sales per employee from the 1992 Economic Census, which are adjusted to an estimated 1995 value. These are multiplied by the individual business sector employment impacts per 100 new tourism employees. The result when summed is an estimate of about \$24 million new sales per 100 new tourism employees. Also summed is all the employment resulting from the new tourism employment; the total is 316 additional jobs (including the 100 assumed for tourism).

The next table presents similar calculations for wages and salaries, but it uses estimates of average wages based on 1995 Employment Security data for the seven Tennessee

Valley states. The summation of the individual impacted businesses is nearly \$5.5 million in wages and salaries per year for the 316 additional jobs.

In addition to wages and salaries, there is proprietors' earnings and other labor income. Other labor income consists of employer payments to benefit plans for employees; for example, payments for pension and health plans. Using 1994 BEA ratios of other earnings to wages and salaries by two digit SIC classifications, these are multiplied by the estimated additional wages to derive estimates of other earnings by sector. The sum of all additional other earnings is nearly \$3.5 million per year.

The fourth and final table brings the preceding resulting together in one table and presents the results in terms of several different levels of number of new jobs in the new tourism project. On the basis of a single new tourism job in Trousdale, we estimate that it could be expected to typically generate an additional 2.2 secondary jobs in the county, \$241,000 new sales revenues, and \$89,000 in earnings for county workers.

Estimated New Sales Per 100 New Tourism Employees
Based On 1995 Data

<i>SIC</i>	<i>Title</i>	<i>Employment</i>	<i>Est. Sales Per Employee (\$000)</i>	<i>Estimated Total New Sales (\$000)</i>
*	Selected Tourism Group	100	48	4,800
5812	Eating Places	63	30	1,890
7011	Hotels and Motels	39	40	1,560
1521	Single Family Construction	22	140	3,080
5411	Grocery Stores	19	120	2,280
2421	Sawmills	15	85	1,275
4911	Electric Services	15	350	5,250
8322	Individual and Family Services	11	35	385
1711	Plumbing, Heating, Air	10	85	850
4311	Postal Service	8	60	480
5541	Gas Service Stations	8	200	1,600
8011	Medical Doctors	6	110	660
	Total	316		\$24,110

* see text for definition

Estimated New Wages & Salaries Per 100 New Tourism Employees
Based On 1995 Data

<i>SIC</i>	<i>Title</i>	<i>Employment</i>	<i>Est. Wages & Salaries Per Emp. (\$000)</i>	<i>Est. Total New Wages & Sal. (\$000)</i>
*	Selected Tourism Group	100	13.9	1,390
5812	Eating Places	63	8.4	529
7011	Hotels and Motels	39	15.5	605
1521	Single Family Construction	22	22.4	493
5411	Grocery Stores	19	12.4	236
2421	Sawmills	15	19.2	288
4911	Electric Services	15	49.2	738
8322	Individual and Family Services	11	14.8	163
1711	Plumbing, Heating, Air	10	27.6	276
4311	Postal Service	8	34.9	279
5541	Gas Service Stations	8	15.9	127
8011	Medical Doctors	6	50.9	305
	Total	316		\$5,429

* see text for definition

Additional Earnings (Estimated Proprietors' Earnings And Other Labor Income¹) Per 100 New Tourism Employees

<i>SIC</i>	<i>Title</i>	<i>1995 Wage Estimates (\$000)</i>	<i>Typical Additional Earnings To Wages Factor³</i>	<i>Est. Additional Earnings (\$000)</i>
	Selected Tourism Group ²	1,390	1.56 ⁴	2,168
5812	Eating Places	529	.23	122
7011	Hotels and Motels	605	.33	199
1521	Single Family Construction	493	.38	187
5411	Grocery Stores	236	.34	80
2421	Sawmills	288	.42	121
4911	Electric Services	738	.24	177
8322	Individual and Family Services	163	.37	60
1711	Plumbing, Heating, Air	276	.74	204
4311	Postal Service	279	0	0
5541	Gas Service Stations	127	.57	73
8011	Medical Doctors	305	.37	113
	Total	\$5,429		\$3,504

¹ Other labor income includes employer payments to employee benefit plans such as pension and health plans. Overall, proprietors' earnings in Tennessee account for about 55% of the total of these two components.

² See report text for the composition of this group.

³ Additional earnings to wages factor is based on 1994 BEA data for all amusement and recreation services in Tennessee;

⁴ This factor should be modified based on specific project information.

Estimated Typical Economic Impacts For Various Levels Of New Tourism Industry Employment In Trousdale County

# of New Tourism Jobs	Additional Secondary Jobs	Sales (\$000)	Total Earnings (\$000)
1	2.2	\$ 241	\$ 89
10	22	\$2,411	\$ 893
25	54	\$6,028	\$2,233
50	108	\$12,055	\$4,467
100	216	\$24,110	\$8,933

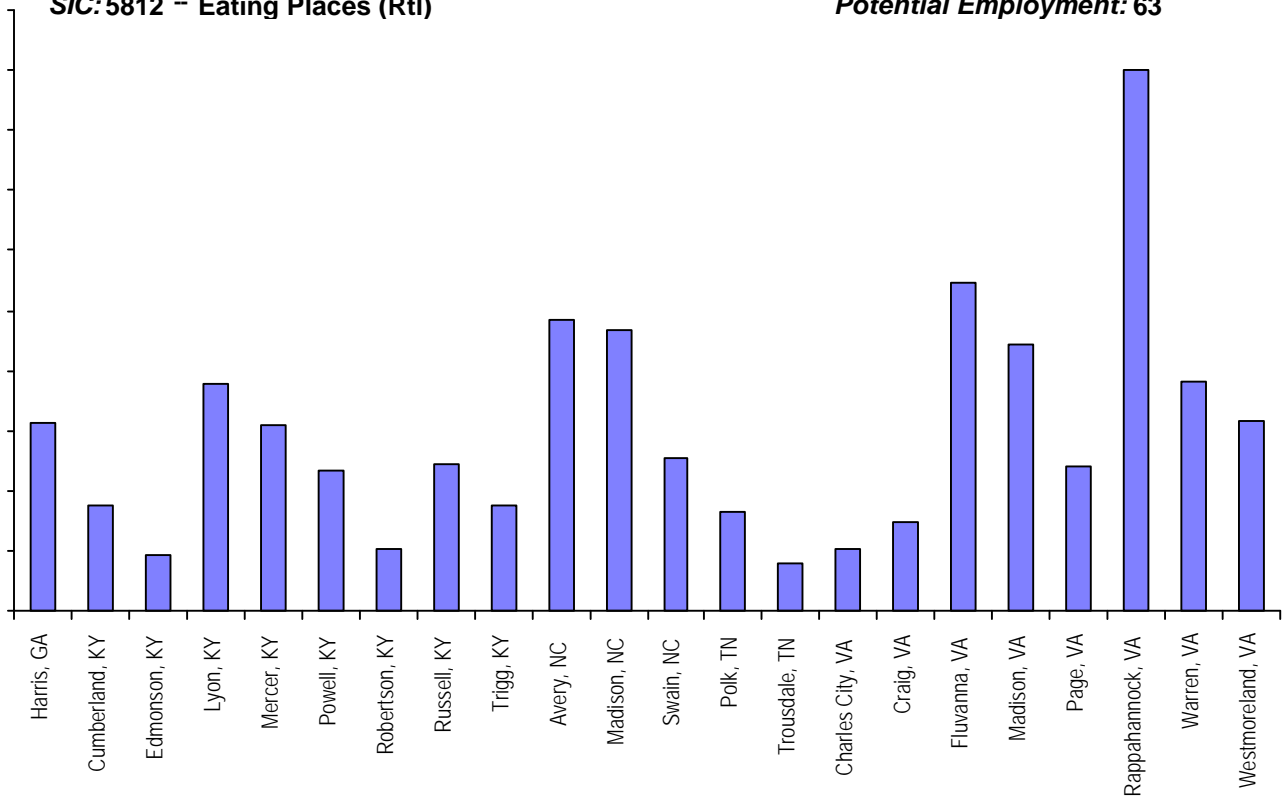
Employment Potential Per 100 Additional Tourism Industry Employees In Trousdale County

Graphs depict employment per (employee in designated tourism industries).

Potential Employment = (population-adjusted average emp. per tourism emp. times 100) minus Trousdale Co. employment.

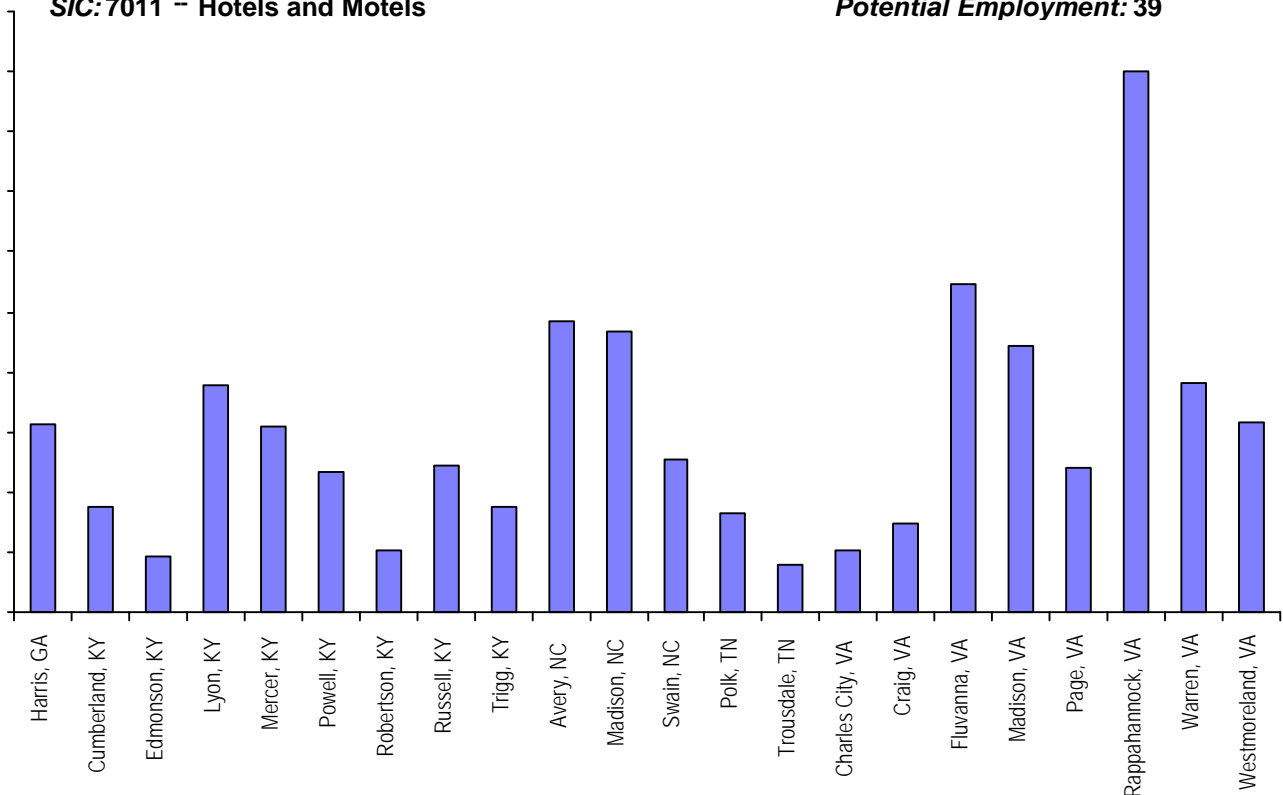
SIC: 5812 - Eating Places (Rtl)

Potential Employment: 63



SIC: 7011 - Hotels and Motels

Potential Employment: 39



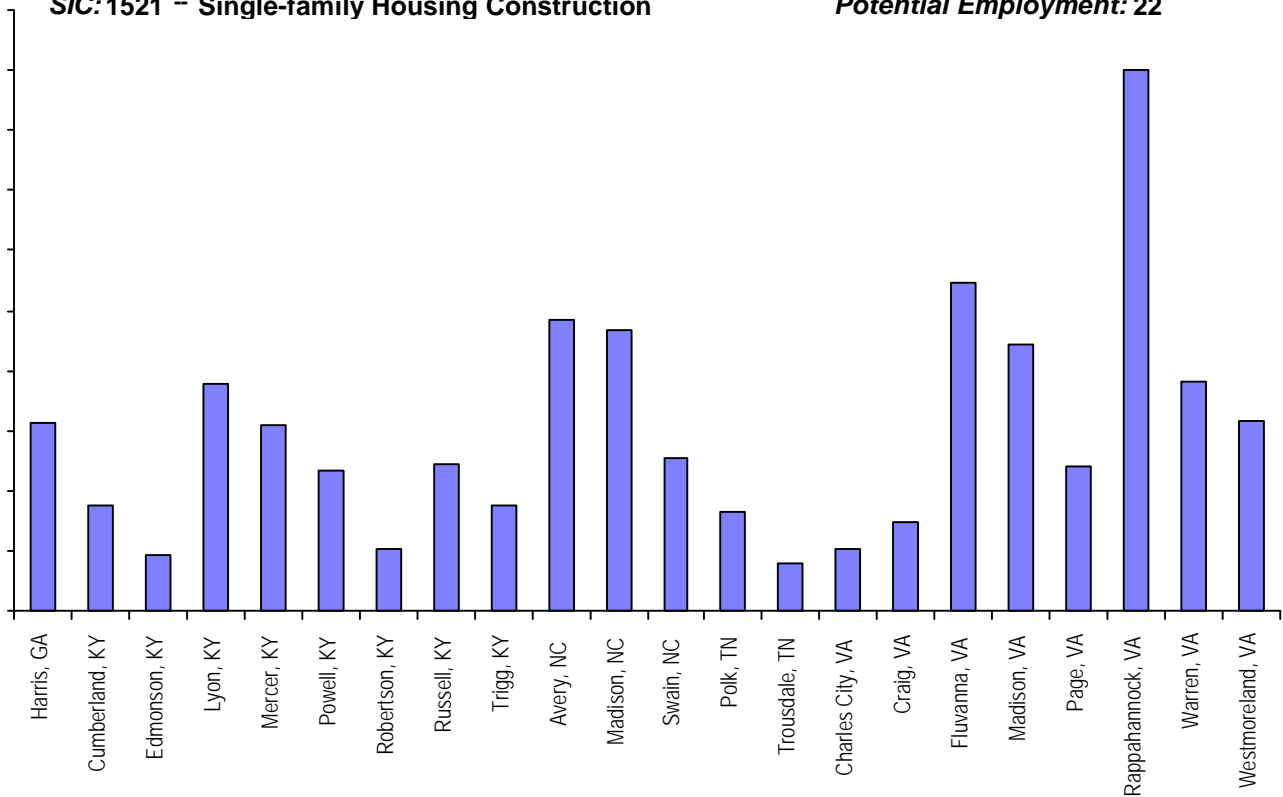
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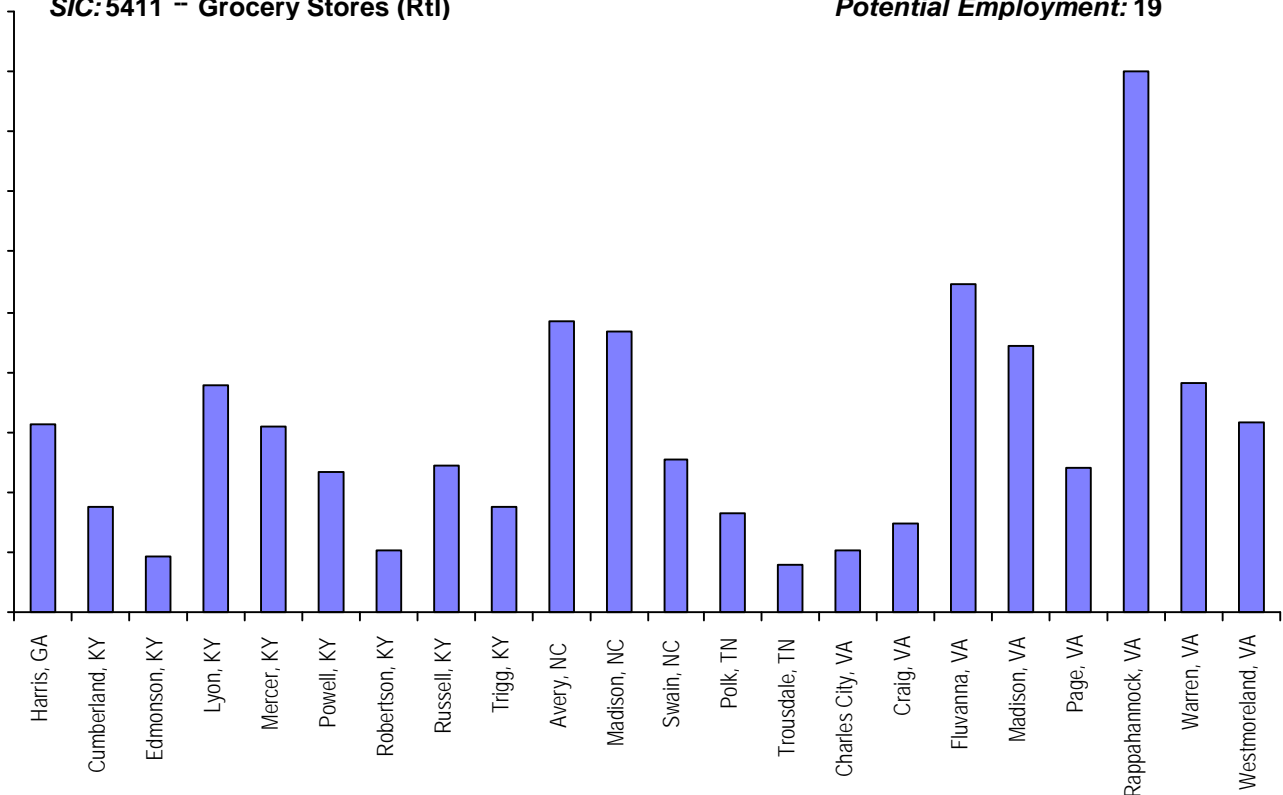
SIC: 1521 - Single-family Housing Construction

Potential Employment: 22



SIC: 5411 - Grocery Stores (Rtl)

Potential Employment: 19



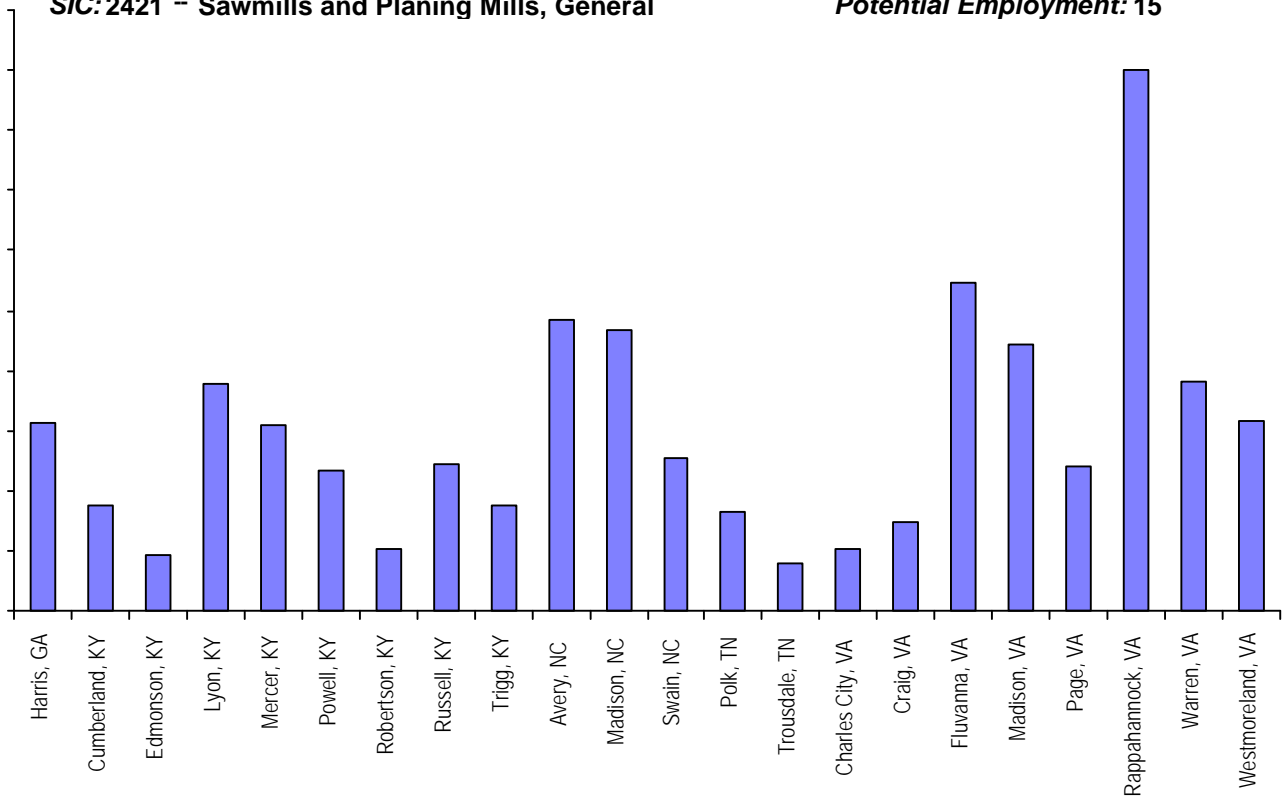
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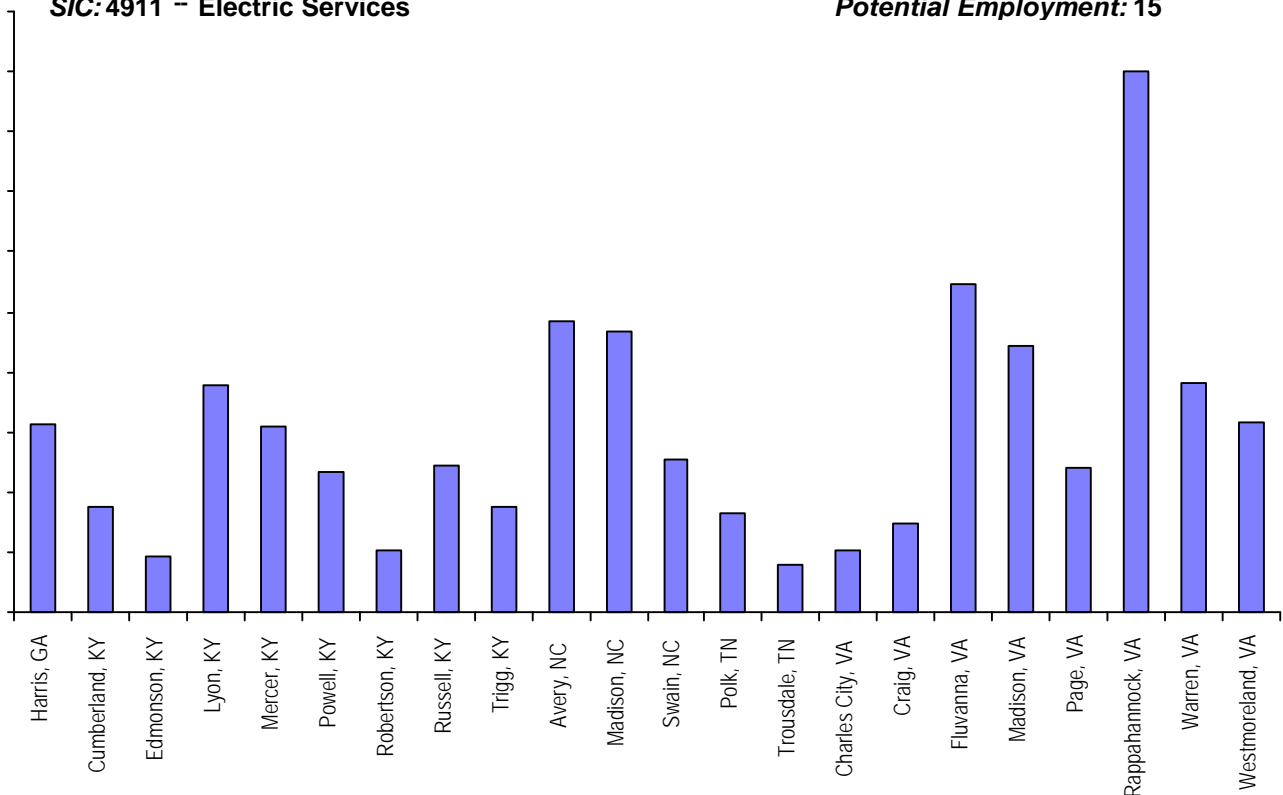
SIC: 2421 - Sawmills and Planing Mills, General

Potential Employment: 15



SIC: 4911 - Electric Services

Potential Employment: 15



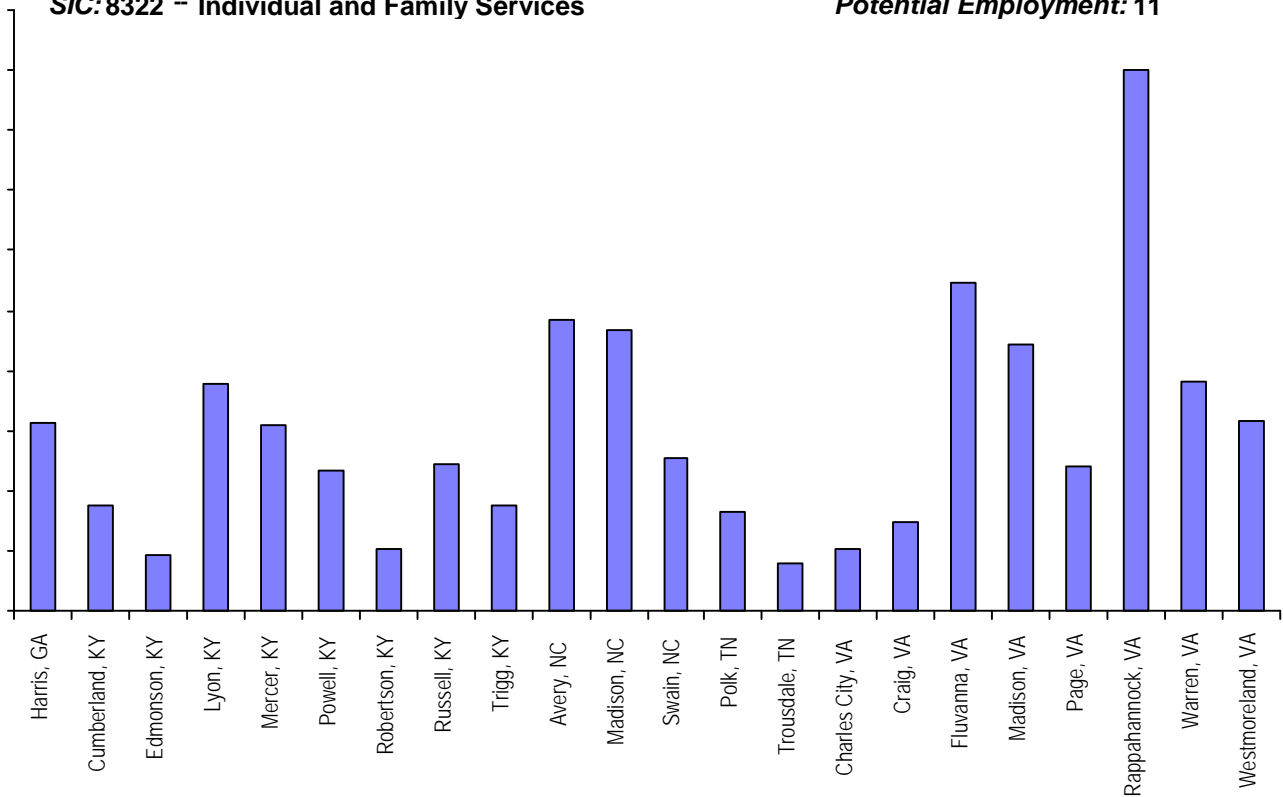
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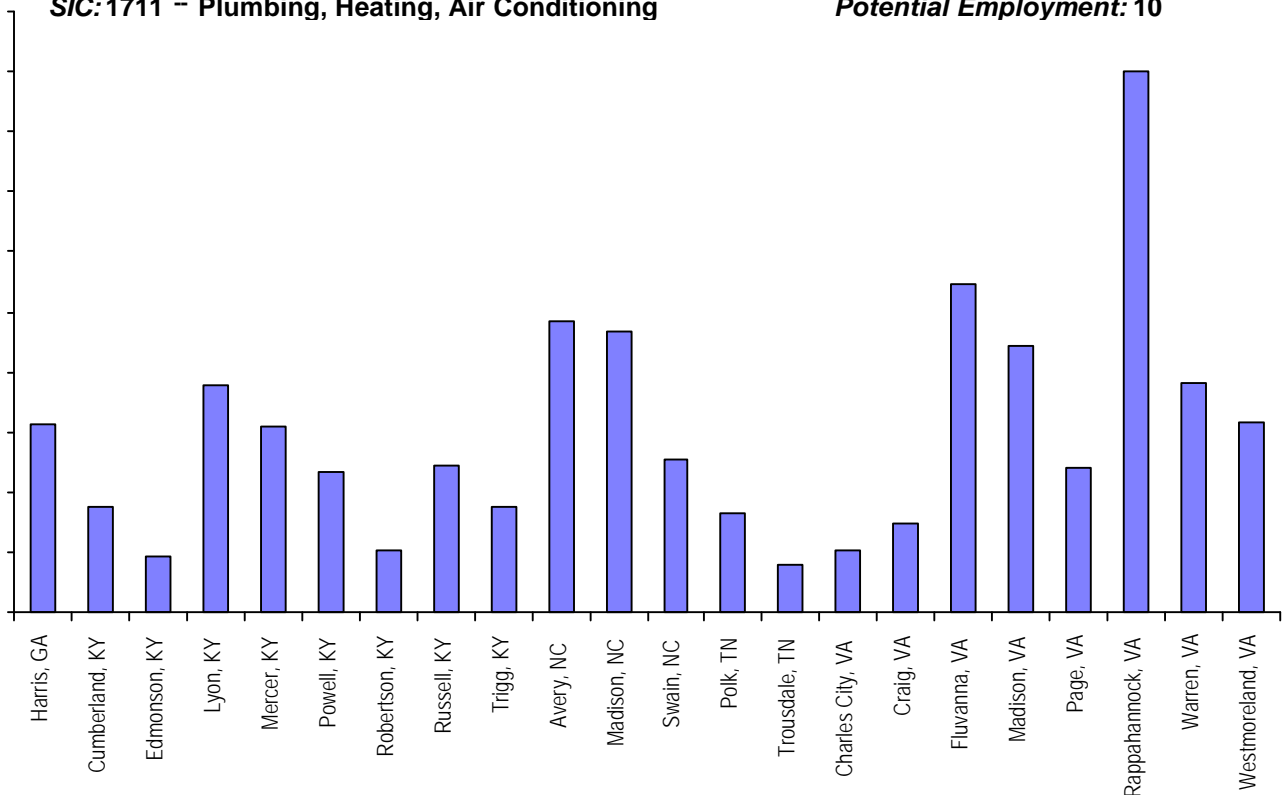
SIC: 8322 - Individual and Family Services

Potential Employment: 11



SIC: 1711 - Plumbing, Heating, Air Conditioning

Potential Employment: 10



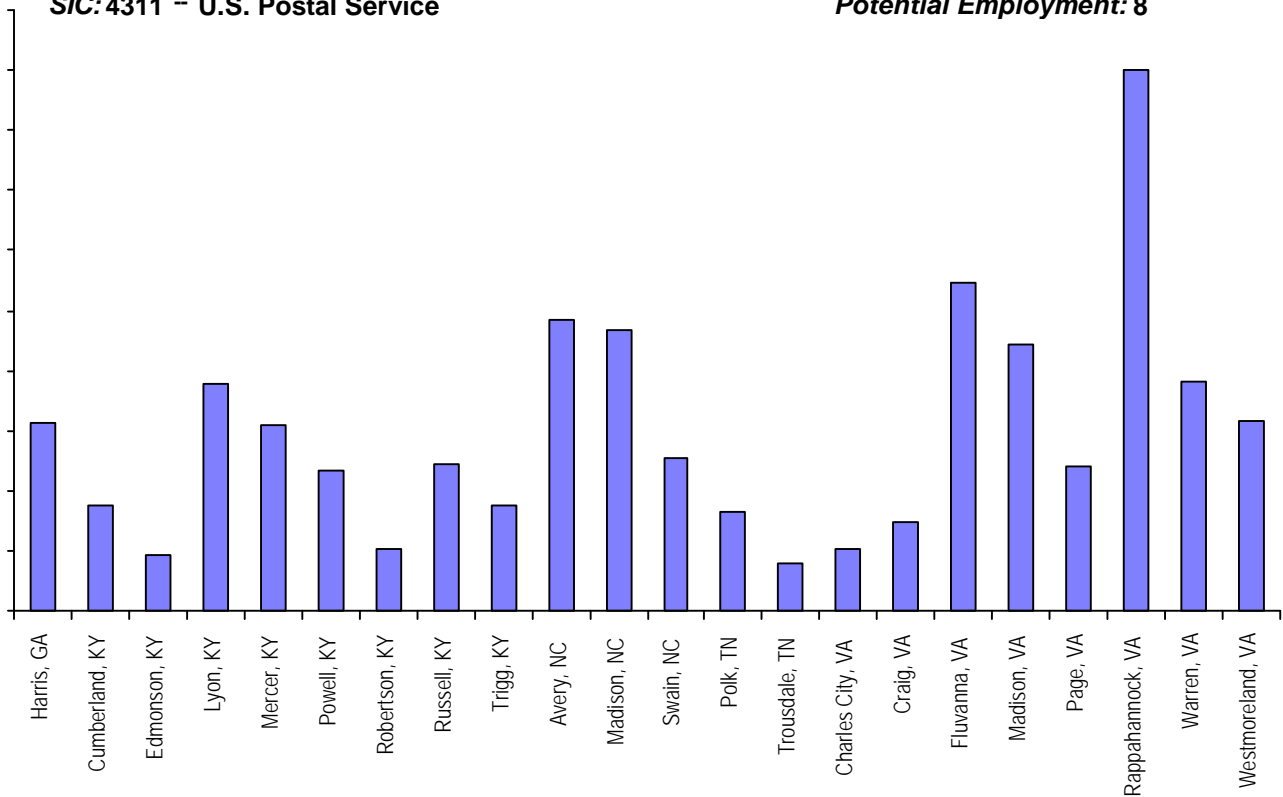
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Potential Employment = (population-adjusted average emp. per tourism emp. times 100) minus Trousdale Co. employment.

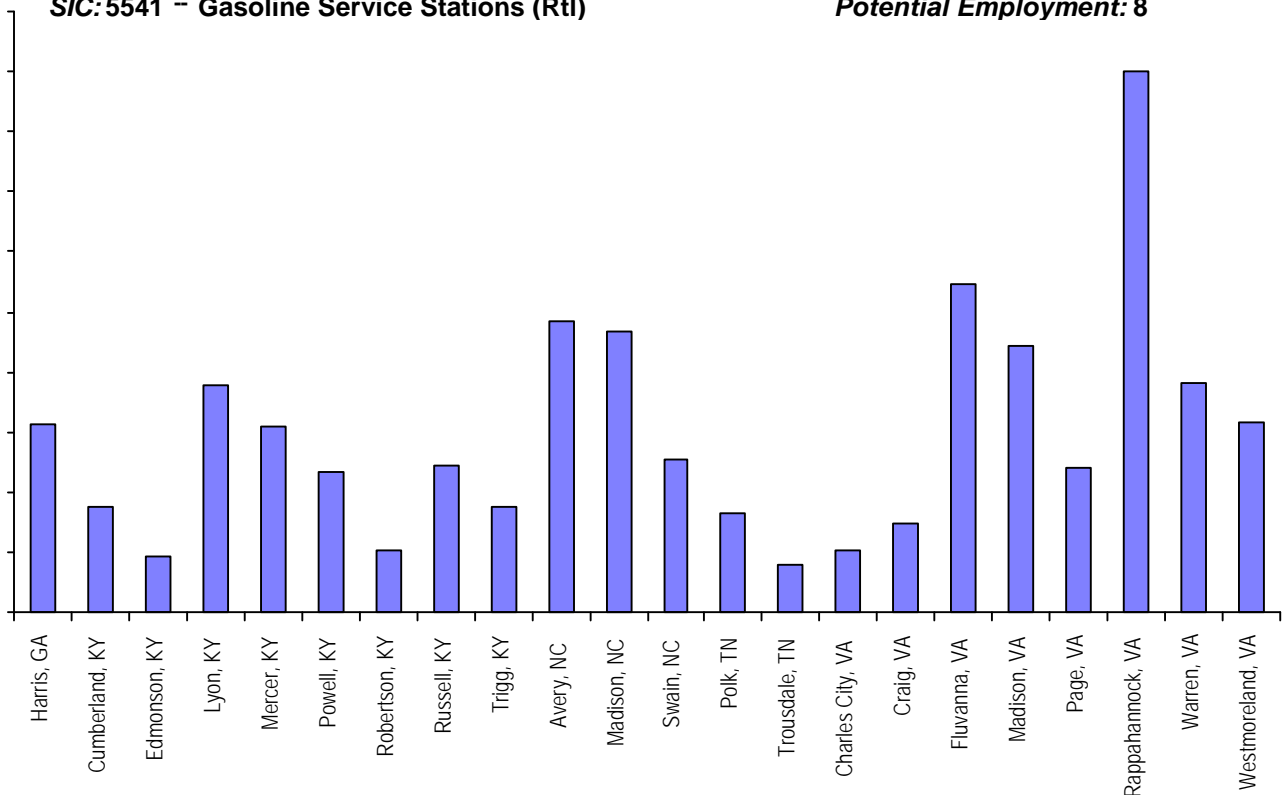
SIC: 4311 - U.S. Postal Service

Potential Employment: 8



SIC: 5541 - Gasoline Service Stations (Rtl)

Potential Employment: 8



Employment Potential Per 100 Additional Tourism Industry Employees In Trousdale County

Graphs depict employment per (employee in designated tourism industries).

Potential Employment = (population-adjusted average emp. per tourism emp. times 100) minus Trousdale Co. employment.

SIC: 8011 – Offices and Clinics of Medical Doctors

Potential Employment: 6

